



**SOLUTIONS**  
BEHAVIORAL HEALTHCARE PROFESSIONALS

# Patient Portal User Guide

Updated: October 2021

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## Introduction

Our Patient Portal allows clients at Solutions to log-in and access their upcoming appointments, view past appointments, view and sign important documents about their services, and make payments along with other features.

Please use caution when accessing your private documents online. While our Patient Portal website is secure, it is your responsibility to ensure your e-mail address is private and no one else has access to your e-mails, and to use good internet safety measures when logging on to the Patient Portal. Do not use public Wi-Fi, or connections you do not trust, and avoid logging in via public, shared computers or other devices where your login details or private information could be compromised. Do not share your password with anyone.

## Accessing and Login to Patient Portal

Registration is required in-order to access the Patient Portal. Please reach out to Solutions staff to register by contacting current provider or calling office toll-free at 866-455-6417.

- 1) If newly registered; an e-mail will be sent to e-mail address given with a link to the Patient Portal.
  - a. Click on Portal Link from within e-mail; will direct to Portal Login Page.
  - b. Click on 'New User-Forgot Password' Button; enter in email address provided for chart access and click on 'Send' Button.
    - i. An email will be sent to username email address entered with a temporary password
  - c. Close out of 'New User-Forgot Password' window pop-up; enter in username email address and temporary password that was just sent, then click 'Login' Button.
  - d. Will then be logged into Portal.
    - i. Please ensure to change password once successfully logged in.
    - ii. Write down Password for future access!
- 2) If currently registered; you can access the Patient Portal at [www.solutionsinpractice.org](http://www.solutionsinpractice.org); from main banner click 'Contact', 'Patient Portal', and then click link 'Click here to access the Patient Portal'.
  - a. Username is e-mail address provided for Portal Access
  - b. If you forgot what password was changed to; please click the 'New User-Forgot Password' button on Portal login page; an e-mail will be sent with a new temporary password.
  - c. If you would like to change the e-mail address associated with your account; please contact provider or main office.
  - d. You can also bookmark the login page for quick access.

***\*Picture Guide of 'Accessing and Login to Patient Portal' provided in Exhibit A.***

## Portal Password Management

### Temporary Password

Once an e-mail is received with temporary password for Patient Portal; this password is only valid for 48 hours. If you have not logged in within 48 hours of receiving e-mail; you can click the 'New User-Forgot

Password' button on Portal login page and another e-mail will be sent to e-mail address with a new temporary password.

### Forgot Password

If you have already created a password but forgot what it is; click the 'New User -Forgot Password' button on Portal login page and another e-mail will be sent to e-mail address with a new temporary password.

### Password Requirements

Your Patient Portal Password must be a minimum of eight characters and include a minimum of:

- 1 upper case character
- 1 lower case character
- 1 number
- 1 special character

Special characters are as follows: !"#%&()\*+,-/;<=>?\_'.

***\*Picture Guide of 'Portal Password Management' provided in Exhibit B.***

## Patient Portal Features

There are multiple features with links to access within the Patient Portal. The items that are available in the Portal are as follows:

- 1) Home Page
- 2) **Selected client** – Client in which to see information on; can have access to multiple client charts
- 3) **Demographics** – Displays the Name, Address, City/State/Zip, Date of birth, Gender, and Phone Numbers in which Solutions currently has associated to client.
- 4) **Audit Log** – Log of who/what/when accessed portal.
- 5) **Treatment Plans / Chart Documents** – View and sign specific treatment plans and chart documents that are within past 1 year.
- 6) **Past Treatment Plans / Chart Documents** – View past treatment plans and chart documents that are older than 1 year.
- 7) **Consents and Authorizations** – View and sign consent and authorization documents.
- 8) **Upcoming Appointments** – View upcoming appointments; date/time, provider, location, and Telehealth Link when applicable.
- 9) **Past Appointments** – View past appointments; date/time, provider, and location.
- 10) **Make Payment / Display Self Pay Payment Transactions** – View last payment received, copay amount, current account balance, self-pay payment transactions from last 30 days, and option to make credit card payment online.
- 11) **Forms** – Complete specific forms in which requested.
- 12) **Surveys** – Complete specific annual client program satisfaction surveys.
- 13) **Change Password** – Directed to page to change login password to portal.

***\*Picture Guide of 'Patient Portal Features' provided in Exhibit C.***

## View and Sign Documents

There is a link to 'Treatment Plans / Chart Documents', and 'Consents and Authorizations'.

Once clicked into one of these links, you have the two options:

- 1) 'Click to display' (Clipboard Icon) → Can only View Document
- 2) 'Click to sign' (Notepad/pencil Icon OR Link with Relation to Client/Signer Name) → Can Sign the Document
  - a. Once click 'I agree, record signature' if brought back to signature page and can view your 'Relationship, Signer Name, Signature date, and Signature user' displayed; you know document has successfully been signed.

***\*Picture Guide of 'View and Sign Documents' provided in Exhibit D.***

## Appointments

There is a link to both "Upcoming Appointments" and "Past Appointments".

Upcoming Appointments: Can view upcoming appointments with the date/time, provider, and location for each of the upcoming appointments.

\*Telehealth Appointments: There also is an 'Appointment Telehealth Link' for when appointment will be conducted via Telehealth; Hyperlinks will appear once Checked-in for that appointment. Click on 'Appointment Telehealth Link' Link and it will bring you directly into telehealth meeting waiting room for session.

Past Appointments: Can view past appointments with what the date/time, provider, and location for each of the past appointments.

***\*Picture Guide of 'Appointments' provided in Exhibit E.***

## Forms

There is a link to a few forms in which can be completed via Portal. Complete those in which directed to. These include: GAD-7, GAIN-SS, PHQ-9, and WHODAS.

***\*Picture Guide of 'Appointments' provided in Exhibit F.***

## View and Make Payments

There is a link for 'Make Payment / Display Self Pay Payment Transactions' in which you can view the last payment received, copay amount, current account balance, self-pay payment transactions from last 30 days, and option to make credit card payment online.

## **Once in the 'Make Payment / Display Self Pay Payment Transactions' Page:**

### Make A Payment

- 1) Under the Actions Section, Click on the 'Make Credit Card Payment' Button.
- 2) Fill out the required fields: Amount, Credit Card #, Expiration Data, CCV, First Name, Last Name, and Credit Card Zip Code.
- 3) Then click on 'Submit credit card for payment'.

### Copay

Under the Actions Section, if you have a copay due at time of appointment, the copay amount will be displayed here.

### View Balance

Under the Total balance Section, our balance due as of today's date will display. Please note this is current 'Client' balance; transactions still pending with insurance will not reflect until processed and then display if any remaining amount is owed by client.

### Self-Pay Payment Transactions

Under the 'Self Pay Payment Transactions from the last 30 days', any payments made by client will be displayed here for the last 30 days. Please note that transactions from insurance will not be displayed here, only self-pay transactions. The date the self-payment was made along with the \$ amount of transaction will be displayed.

### View/Print Payment Receipt

Within the 'Self Pay Payment Transactions from the last 30 days' there is a clipboard icon in which you can select that is displayed in transaction line to view/print receipt for that specific transaction. Please note these are transaction receipts for only the last 30 days.

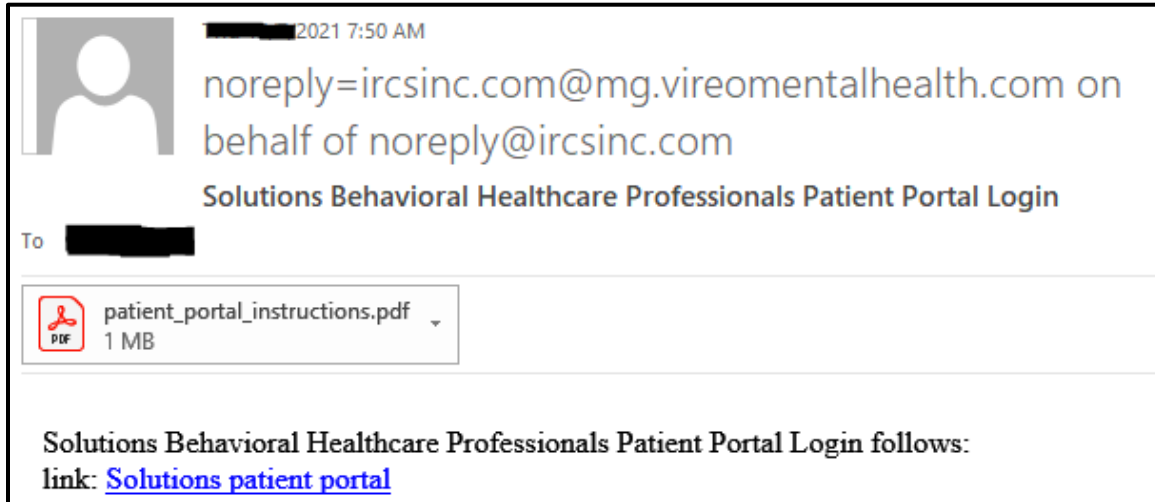
***\*Picture Guide of 'View and Make Payments' provided in Exhibit G.***

# Exhibits

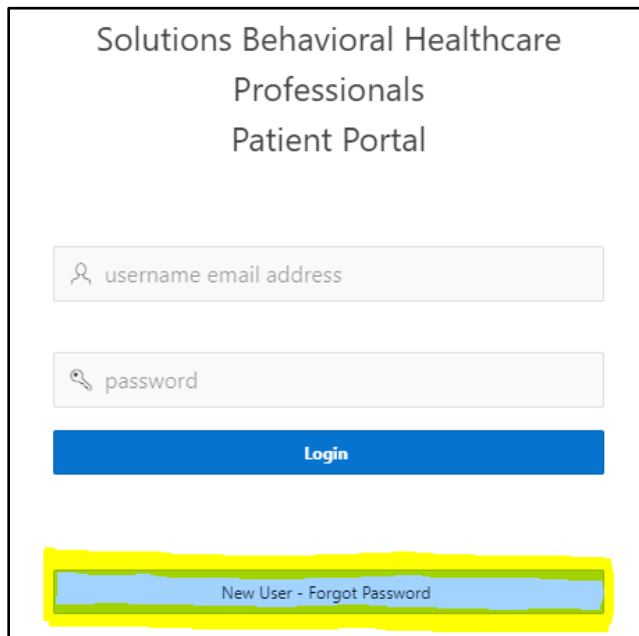
## Exhibit A - Accessing and Login to Patient Portal

### Newly Registered

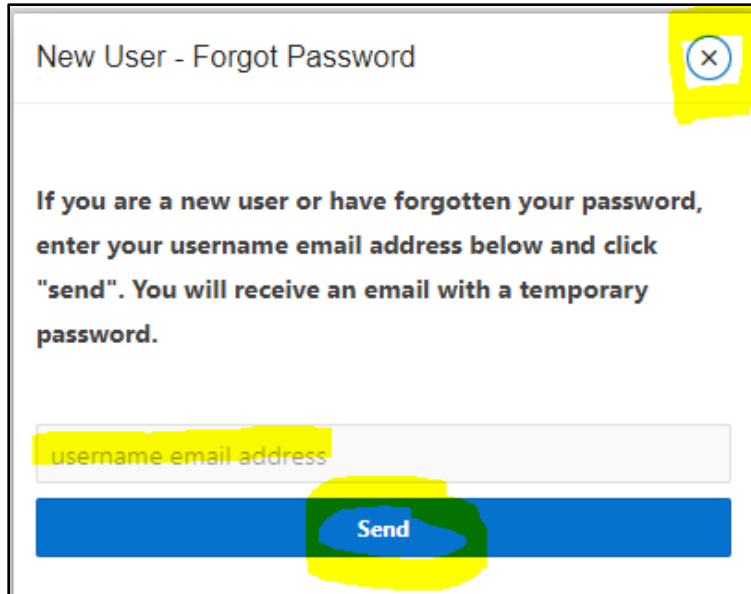
- 1) Will receive e-mail similar to below or Link will be provided in 'Intake e-mail'.



- 2) Click on Link 'Solutions Patient Portal' provided in e-mail.
- 3) In webpage that opens, click on 'New User – Forgot Password' Button.

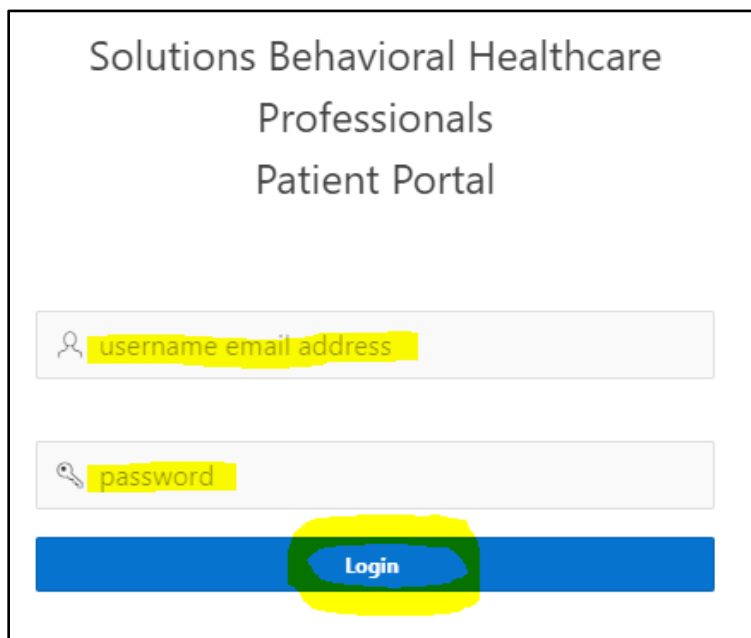


- 4) Enter in email address provided for chart access and click on 'Send' Button.
  - i. An email will be sent to username email address entered with a temporary password



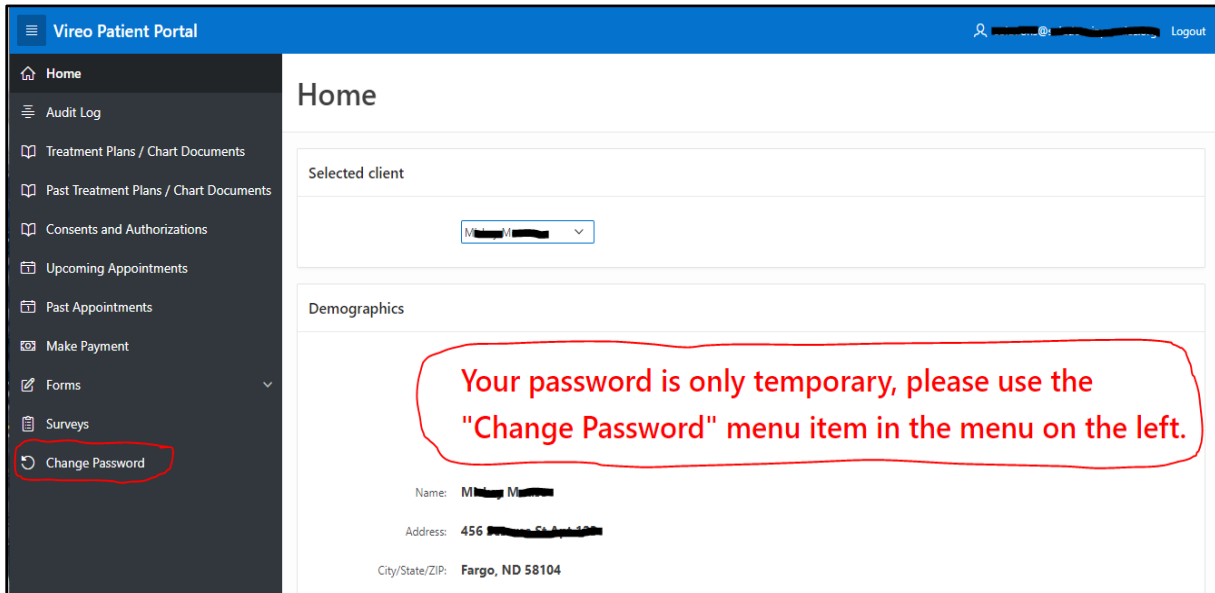
The screenshot shows a web form titled "New User - Forgot Password". At the top right, there is a close button (an 'x' in a circle) highlighted with a yellow sticky note. Below the title, there is instructional text: "If you are a new user or have forgotten your password, enter your username email address below and click 'send'. You will receive an email with a temporary password." Below this text is a text input field containing the placeholder text "username email address", which is highlighted with a yellow sticky note. At the bottom of the form is a blue button labeled "Send", which is also highlighted with a yellow sticky note.

- 5) Close out of 'New User-Forgot Password' window pop-up; enter in username email address and temporary password that was just sent, then click 'Login' Button.

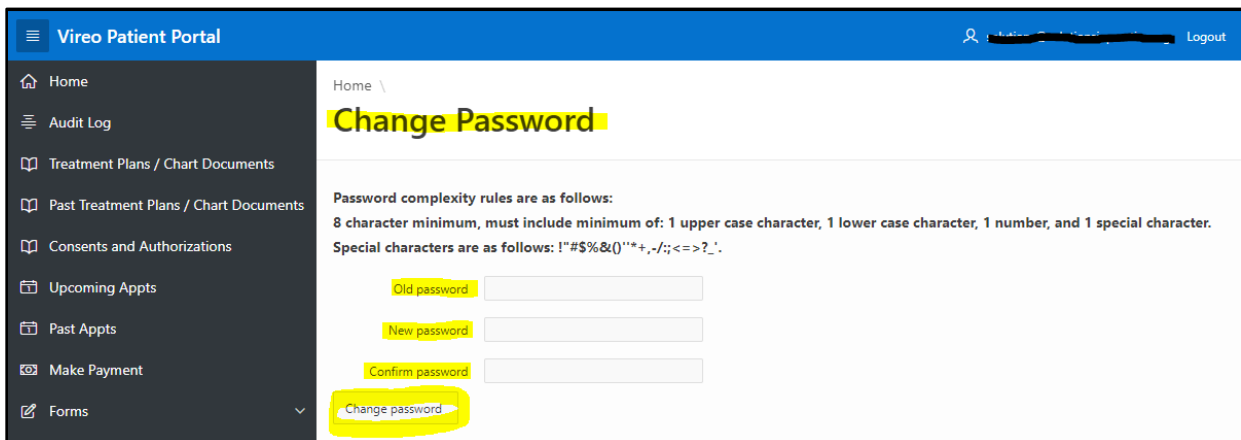


The screenshot shows the login page for "Solutions Behavioral Healthcare Professionals Patient Portal". The page has a header with the text "Solutions Behavioral Healthcare Professionals Patient Portal". Below the header are two text input fields. The first field is for the "username email address" and is highlighted with a yellow sticky note. The second field is for the "password" and is also highlighted with a yellow sticky note. At the bottom of the form is a blue button labeled "Login", which is highlighted with a yellow sticky note.

- 6) Upon successful login an Alert Message will populate informing to change password as current password is only temporary; so will need to click on 'Change Password' link.



- 7) Once in the 'Change Password' link will need to enter in 'Old password', enter in 'New password', re-enter in New Password in the 'Confirm password', and click "Change password" button. Please note the Password complexity rules provided!





- 8) Upon successful password change, a message informing ‘Password Has Been Successfully Changed, Please Log Out and Back In’ will appear; Please Logout and Back in to ensure new password is linked.

Vireo Patient Portal

Home \

## Change Password

Password complexity rules are as follows:  
8 character minimum, must include minimum of: 1 upper case character, 1 lower case character, 1 number, and 1 special character.  
Special characters are as follows: !"#%&()\*'+,-./:;<=>?\_.

Old password

New password

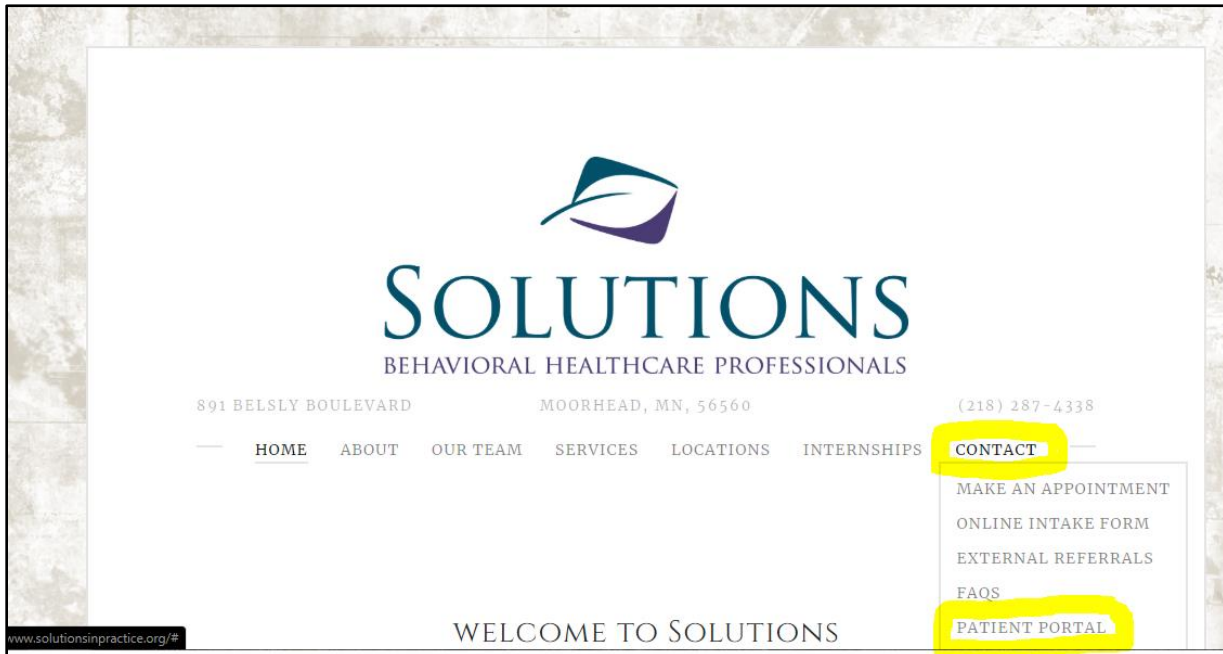
Confirm password

Change password

Password Has Been Successfully Changed, Please Log Out and Back In

### Currently Registered

- 1) Within web browser go to [www.solutionsinpractice.org](http://www.solutionsinpractice.org)
- 2) From main banner click ‘Contact’, and then click ‘Patient Portal’



3) In page that opens click the 'Click here to access the Patient Portal' link.

**SOLUTIONS**  
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— HOME ABOUT OUR TEAM SERVICES LOCATIONS INTERNSHIPS CONTACT —

### PATIENT PORTAL

Our Patient Portal allows clients at Solutions to log-in and access their upcoming appointments and important documents about their services, with more features being added in the near future.

To sign up for the Patient Portal, please let us know you would like to register at your next appointment. To register, you will need to provide us with a valid and private e-mail address, which will be your username. We will then e-mail you a randomly generated password as well as a link to the Patient Portal.

[Click here to access the Patient Portal](#)

To log in:

4) Will then be brought to Portal Login Screen to enter Username/Password and Login

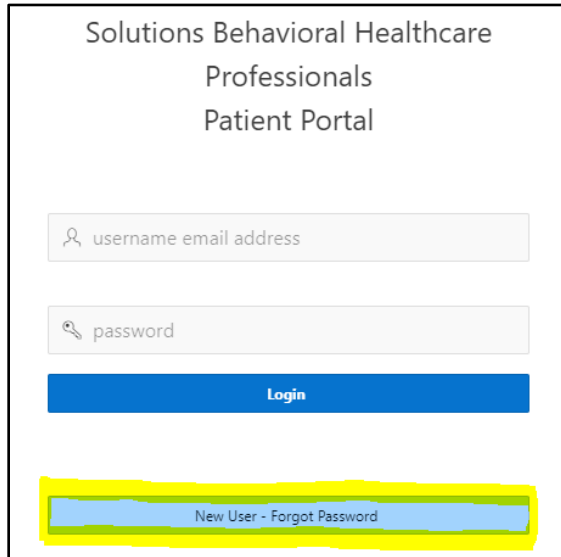
Solutions Behavioral Healthcare  
Professionals  
Patient Portal

[Login](#)

## Exhibit B - Portal Password Management

### Forgot Password

- 1) If you forgot what your password is you can generate a new temporary password clicking on the 'New User-Forgot Password' button from on the Patient Portal Login Page.



Solutions Behavioral Healthcare  
Professionals  
Patient Portal

username email address

password

Login

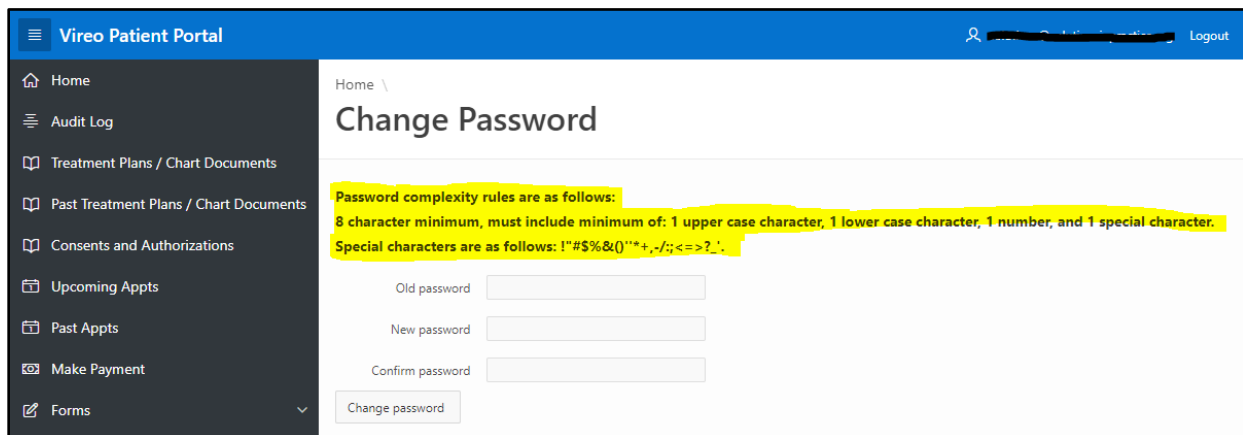
New User - Forgot Password

- 2) An e-mail will be generated to the Username e-mail and then follow the "Newly Registered" steps under the 'Accessing and Login to Patient Portal' section. \*Please note that password within e-mail is only temporary; only valid for 48 hours after receiving e-mail.

### Password Requirements

- 1) When changing the portal password there are password complexity rules to follow which is that the password Must be a minimum of eight characters and include a minimum of:
  - a. 1 upper case character
  - b. 1 lower case character
  - c. 1 number
  - d. 1 special character

Special characters are as follows: !"#\$%&()\*+,-/;<=>?\_'. .



Vireo Patient Portal

Home \

### Change Password

Password complexity rules are as follows:  
8 character minimum, must include minimum of: 1 upper case character, 1 lower case character, 1 number, and 1 special character.  
Special characters are as follows: !"#\$%&()\*+,-/;<=>?\_'. .

Old password

New password

Confirm password

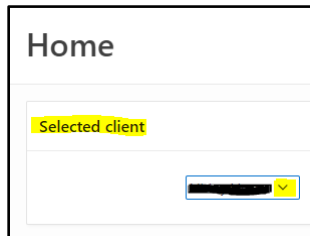
Change password

## Exhibit C - Patient Portal Features

There are multiple features with links to access within the Patient Portal. The items that are available in the Portal are as follows:

### Selected Client

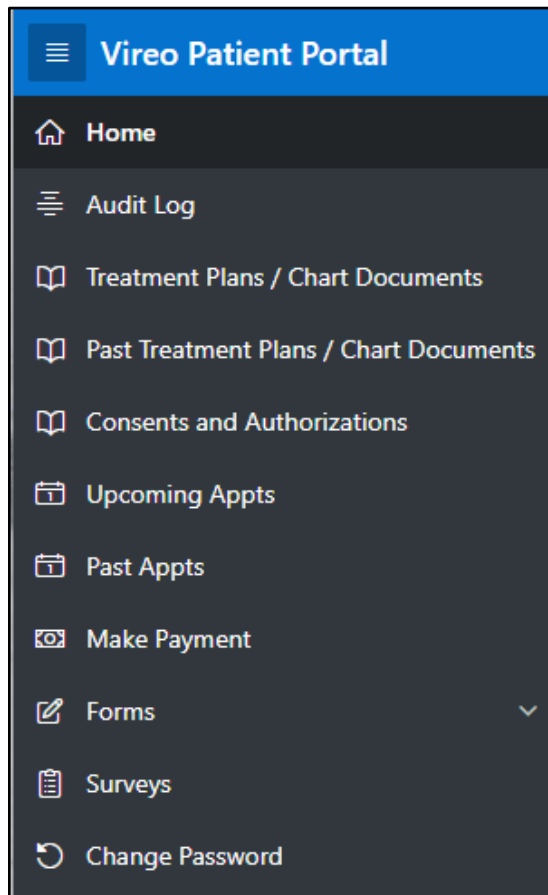
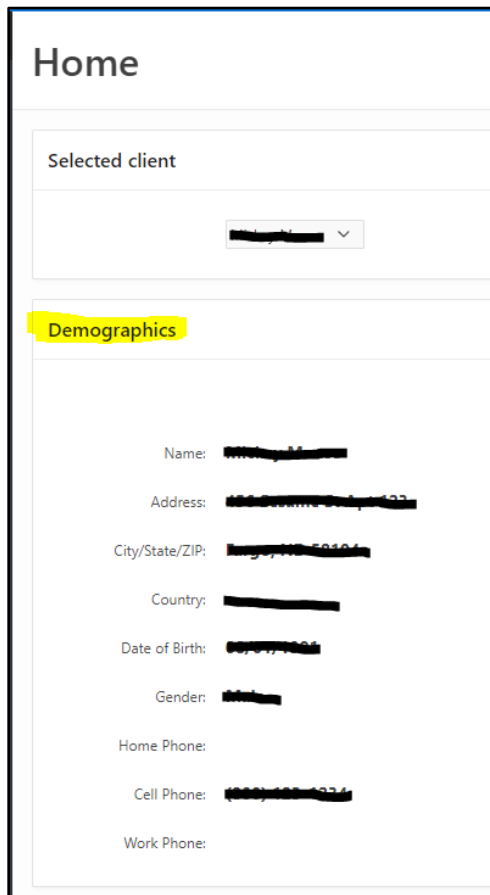
Client in which to see information on; can have access to multiple client charts.



- 1) If have access to multiple charts; click the arrow button to right of name currently displaying to switch to a different client chart.

### Demographics

Displays the Name, Address, Cite/State/Zip, Date of birth, Gender, and Phone Numbers in which Solutions currently has associated to client.



## Portal Features

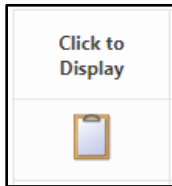
There are multiple links within the Portal. They are as follows:

- 1) Audit Log – Log of who/what/when accessed portal.
- 2) Treatment Plans / Chart Documents – View and sign program Treatment Plans and specific chart documents requested.
- 3) Consents and Authorizations – View and sign consent and authorization documents.
- 4) Upcoming Appointments – View upcoming appointments; date/time, provider, and location.
- 5) Past Appointments – View past appointments; date/time, provider, and location.
- 6) Make Payment / Display Self Pay Payment Transactions – View last payment received, copay amount, current account balance, self-pay payment transactions from last 30 days, print transaction receipts, and option to make credit card payment online.
- 7) Forms – Complete specific forms in which requested.
- 8) Surveys – Complete annual specific program client satisfaction surveys.
- 9) Change Password – Directed to page to change login password to portal.

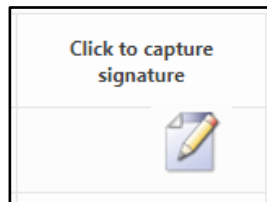
## Exhibit D - View and Sign Documents

There is a link to 'Treatment Plans/Chart Documents' and 'Consents and Authorizations'; have 2 options:

- 1) 'Click to display' (Clipboard Icon) → Can only View Document



- 2) 'Click to capture signature' (Notepad/pencil Icon OR Link with Relation to Client/Signer Name) → Can Sign the Document



- 3) Fill out the 'Relationship to client', 'Name of signator', sign within signature box, and then click "I agree, capture signatre" button.

Home \ Consents and Authorizations \

## Consent Client Esign

Title and name

Title: **Client**

Relationship to client:    
Case Worker  
Client  
Parent/Guardian  
Scan  
Witness  
\*\*\*\*Please be sure to document "name of signator" if "Relationship to client" is not "Client", otherwise the signature will not capture.

Name of signator:

Signature form (mouse)

Clear signature in process



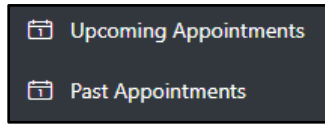
- a. Once click 'I agree, record signature' should receive a 'Signature captured successfully' message pop-up and be brought back to specific link page. The link to captured signature should be gone, Status of document should be 'Final' (if no other signatures required) and can view signature if 'click to display' the document.

ehr.solutionsinpractice.org says

Signature captured successfully.

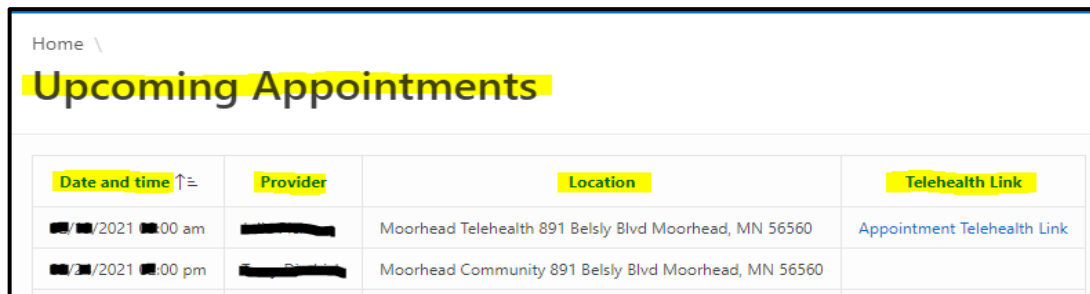
## Exhibit E – Appointments

There is a link to both “Upcoming Appointments” and “Past Appointments”.



Upcoming Appointments: Can view upcoming appointments with the date/time, provider, and location for each of the upcoming appointments.

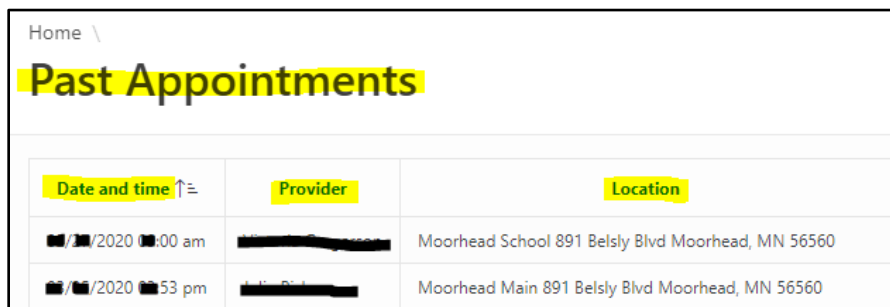
\*Telehealth Appointment: Once “Checked-in” for Appointment; the ‘Appointment Telehealth Link’ will appear next that that specific appointment. This is a Hyperlink to Telehealth Meeting (Click on Link and it will bring you directly into telehealth meeting waiting room for session)



The screenshot shows a web page titled "Upcoming Appointments" under a "Home" breadcrumb. Below the title is a table with four columns: "Date and time", "Provider", "Location", and "Telehealth Link". The first row shows an appointment on 11/11/2021 at 10:00 am at Moorhead Telehealth 891 Belsly Blvd Moorhead, MN 56560, with a blue "Appointment Telehealth Link". The second row shows an appointment on 11/12/2021 at 1:00 pm at Moorhead Community 891 Belsly Blvd Moorhead, MN 56560.

Date and time ↑	Provider	Location	Telehealth Link
11/11/2021 10:00 am	[REDACTED]	Moorhead Telehealth 891 Belsly Blvd Moorhead, MN 56560	<a href="#">Appointment Telehealth Link</a>
11/12/2021 1:00 pm	[REDACTED]	Moorhead Community 891 Belsly Blvd Moorhead, MN 56560	

Past Appointments: Can view past appointments with what the date/time, provider, and location for each of the past appointments.

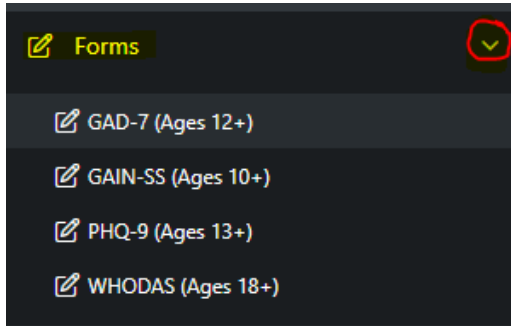


The screenshot shows a web page titled "Past Appointments" under a "Home" breadcrumb. Below the title is a table with three columns: "Date and time", "Provider", and "Location". The first row shows a past appointment on 11/11/2020 at 10:00 am at Moorhead School 891 Belsly Blvd Moorhead, MN 56560. The second row shows a past appointment on 11/12/2020 at 1:53 pm at Moorhead Main 891 Belsly Blvd Moorhead, MN 56560.

Date and time ↑	Provider	Location
11/11/2020 10:00 am	[REDACTED]	Moorhead School 891 Belsly Blvd Moorhead, MN 56560
11/12/2020 1:53 pm	[REDACTED]	Moorhead Main 891 Belsly Blvd Moorhead, MN 56560

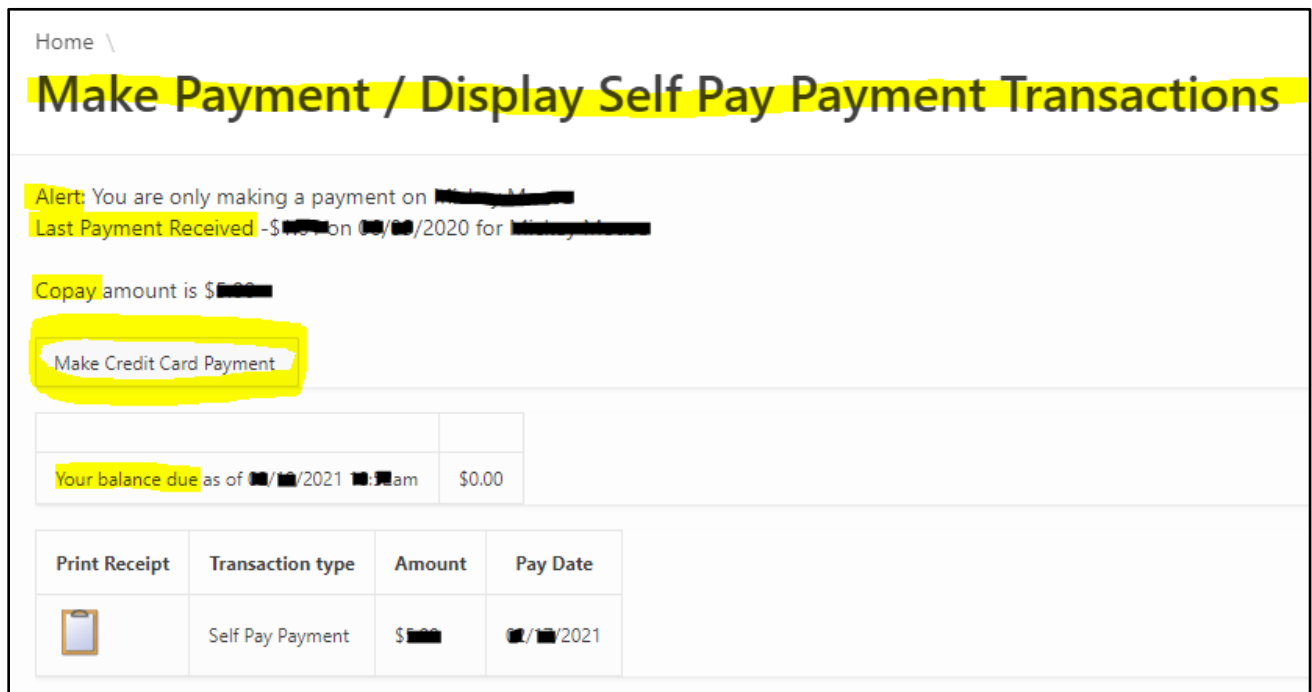
## Exhibit F – Forms

There is a link to a few forms in which can be completed via Portal. Complete those in which directed to. These include: GAD-7, GAIN-SS, PHQ-9, and WHODAS.



## Exhibit G - View and Make Payments

There is a link for 'Make Payment / Display Self Pay Payment Transactions' in which you can view the last payment received, copay amount, current account balance, self-pay payment transactions from last 30 days, and option to make credit card payment online.



Home \

### Make Payment / Display Self Pay Payment Transactions


Alert: You are only making a payment on [redacted]

Last Payment Received - \$[redacted] on [redacted]/[redacted]/2020 for [redacted]

Copay amount is \$[redacted]

[Make Credit Card Payment](#)

Your balance due as of [redacted]/[redacted]/2021 [redacted]am \$0.00

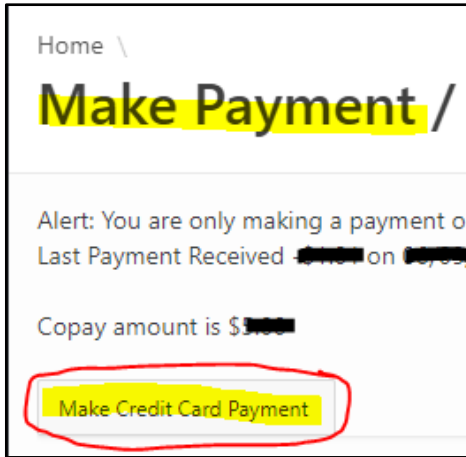
Print Receipt	Transaction type	Amount	Pay Date
	Self Pay Payment	\$[redacted]	[redacted]/[redacted]/2021



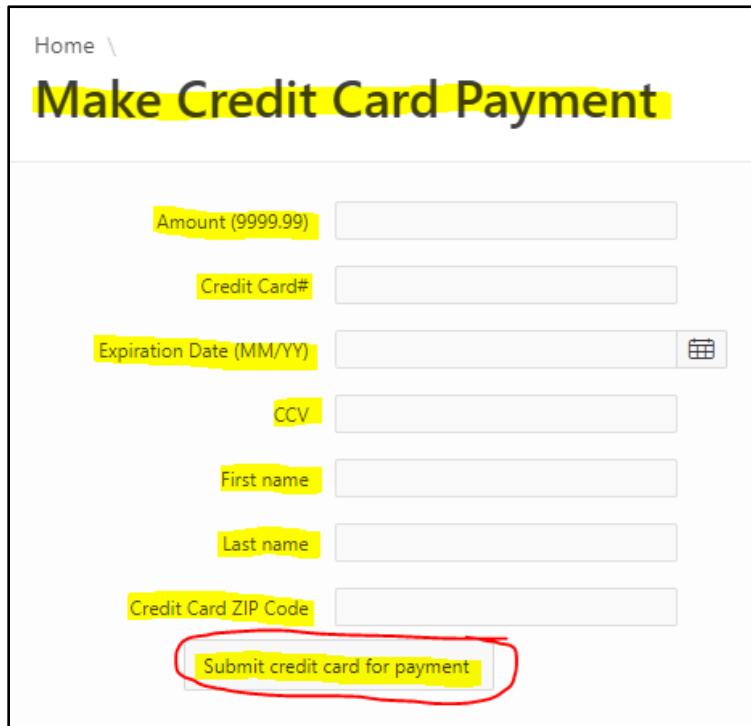
Once in the 'Make Payment / Display Self Pay Payment Transactions' page:

Make A Payment

- 1) Under the Actions Section, Click on the 'Make Credit Card Payment' Button.




- 2) Fill out the required fields: Amount, Credit Card #, Expiration Data, CCV, First Name, Last Name, and Credit Card Zip Code.
- 3) Then click on 'Submit credit card for payment'.

A screenshot of a web application interface for making a credit card payment. At the top left, it says 'Home \'. The main heading is 'Make Credit Card Payment' in large, bold, black font. Below the heading, there are several input fields: 'Amount (9999.99)', 'Credit Card#', 'Expiration Date (MM/YY)' (with a calendar icon), 'CCV', 'First name', 'Last name', and 'Credit Card ZIP Code'. At the bottom of the form, there is a button labeled 'Submit credit card for payment' which is highlighted in yellow and circled in red.

### Print Payment Receipts

For any payment made within the last 30 days, there is an option to Print this receipt. Click on the Icon next to the Date/payment amount in which you would like to view/print.

Print Receipt	Transaction type	Amount	Pay Date
	Self Pay Payment	\$5.00	02/17/2021

### Copay

Under the Actions Section, if you have a copay due at time of appointment, the copay amount will be displayed here.

Home \

## Make Payment / Display

Alert: You are only making a payment on [REDACTED]  
Last Payment Received: [REDACTED] on [REDACTED] for [REDACTED]

Copay amount is \$[REDACTED]


### View Balance

Under the Total balance Section, our balance due as of today's date will display. Please note this is current 'Client' balance; transactions still pending with insurance will not reflect until processed and then display if any remaining amount is owed by client.

Your balance due as of [REDACTED] 2021 [REDACTED] am \$[REDACTED]

### Self-Pay Payment Transactions

Under the 'Self Pay Payment Transactions from the last 30 days', any payments made by client will be displayed here for the last 30 days. Please note that transactions from insurance will not be displayed here, only self-pay transactions. The date the self-payment was made along with the \$ amount of transaction will be displayed.

Print Receipt	Transaction type	Amount	Pay Date
	Self Pay Payment	\$[REDACTED]	[REDACTED]/[REDACTED]/2021